Cal CARTs Shelter Intake Recommendations

For Use with Shelterly

Summary

This document recommends procedures for animal intake at a shelter, using both paper forms and Shelterly. If Shelterly is temporarily unavailable, these procedures can be used with paper only. *Note: These recommendations do not preclude alternative intake procedures that may be a better fit for your organization, but they provide useful considerations when designing your shelter intake process.*

Background

When animals arrive at the shelter, you can intake them directly into Shelterly at each vehicle using an iPad or other internet-connected device. However, using paper forms for the initial intake steps (with later data entry into Shelterly) has some advantages: Intake Runners do not require Shelterly skills, and the Shelterly Intake Technician can focus on the specific job of data entry and printouts in Shelterly. Some organizations also prefer the redundancy of keeping paper records for all animals, as well as the flexibility to work without an internet connection.

Intake Roles

The following roles can be assigned for the shelter intake process. Note that in smaller incidents, roles may be combined (e.g. one Intake Runner, and one Intake Lead/Specialist/Shelterly Technician).

Title	Description	Skills
Intake Runner(s)	Meets each vehicle (members of the public or field teams), assigns an intake ID # to each animal, gathers intake information, and brings the info to the Intake Specialist.	Detail orientation Strong people skills
Intake Specialist(s)	Sits at Intake Station table and enters data from Intake Runners into Master Intake form. Manages allocation of unique intake ID #s for animals. Coordinates with shelter leads for transfer of incoming animals to shelter enclosures. Maintains binder of Shelter Intake and Liability forms.	Detail orientation Understands entire intake process
Shelterly Intake Technician	Sits at Intake Station table and does Shelterly data entry from paperwork provided by Intake Runners.	Trained in Shelterly Comfortable with technology
Intake Lead	Oversees entire intake process and handles escalated problems. Provides regular cross-checks between paperwork, Shelterly, and the physical shelter map to ensure no animals are lost.	Trained in Shelterly Understands entire intake process Strong problem-solving skills

Forms in Shelterly

Except where noted, the following paper forms can be found on the Shelterly website (https://shelterly.org/training). These forms were designed for compatibility and ease of use with Shelterly, but can also be used independently.

Form	Description	Usage
Master Intake Form	Table format, one row per animal (or group of animals). Includes minimal owner/contact and animal info. Includes both the manually-generated Intake ID #s, and the associated Shelterly A#s (once the intake details are entered into Shelterly).	Intake Specialist fills out form. Typically one Master Intake form per Intake Station.
Shelter Intake Form	Contains all necessary info for animal intake – owner/contact information, animal details, and triage info. Each Shelter Intake form usually corresponds to one row on the Master Intake form. Your organization may wish to print these forms in carbonless triplicate (one copy for file, one to stay with animal, and one for the owner). The same can be achieved with a photocopier at the intake station. Comes in a one-page version with a single animal, or a two-page version with two animals.	Intake Runner (meeting each person or vehicle at the shelter) fills out form. Intake Specialist uses form to fill in Master Intake form. Shelterly Intake Tech uses form to do data entry in Shelterly.
Visit Information Form	Contains visit notes and animal outcomes for a service request assigned to a Field Team.	Field Team Scribe fills it out, Intake runner copies relevant info onto Shelter Intake form.
Found Animal Form	Contains owner/contact information, animal details, and triage info. Used when a field team finds an animal not listed in their field assignment.	Field Team Scribe fills it out, Intake Runner copies relevant info onto Shelter Intake form.
Service Request Form	Contains all necessary info for a Service Request (SR) – owner/contact information and animal details. Comes in a one-page version with a single animal, or a two-page version with three animals.	Hotline Operator fills out form, then enters into Shelterly after the hotline call is complete (or later if Shelterly is currently unavailable).
Vet Liability Release, Shelter Liability Release	*Accessed via Shelterly Owner Details > Download Owner Summary.* Your organization may wish to use your own liability forms in carbonless triplicate.	Signed by owner for sheltered animals.
Animal Care Schedule	*Accessed via Shelterly Animal Details > Download Animal Care Schedule.* Your organization may wish to use your own animal care schedules.	Shelter team uses to log animal care notes.

Scenarios

Below are the various shelter intake scenarios and the recommended procedure for each when using the paper forms listed above.

Intake Walk-in from Owner:

1. Intake Runner obtains a unique Intake ID # from the Intake Specialist, then assigns that number to the animal (or animal group). Fills out one Shelter Intake form per animal (or animal group) with the assigned Intake ID # and owner and animal information.
2. Intake Specialist fills in one row on the Master Intake form with info provided by Intake Runner for each animal (or animal group). Manages the allocation of unique Intake ID #s to the Intake Runners (see "Intake ID" in Best Practices below).
3. Shelterly Intake Tech uses the Shelterly "Intake from Walk-In (Owner)" workflow, and then adds the Shelterly A# to the Shelter Intake form and to the Master Intake form. Prints Liability release(s) and Animal Care Schedule.
4. Intake Specialist requests a shelter runner to transfer animal to a shelter enclosure, and adds building/room (if known) to the Shelter Intake form. Gives the shelter runner a copy of the Shelter Intake form and also the printed Animal Care Schedule.
    - Shelter team adds A# to shelter map (use Intake ID # if A# not yet available).
5. Shelterly Intake Tech updates animal with building/room in Shelterly (or this may be handled by the shelter team).
6. Intake Runner returns to owner and gives them a copy of the Shelter Intake form. Gets owner to sign liability release(s), gives owner a copy, and returns signed original to Intake Specialist.
    - Note: if using a Shelterly-generated Owners Summary/Liability Release, a copy of this replaces the need to give the owner a copy of the Shelter Intake form.
7. Intake Specialist files Shelter Intake form and Liability release(s) in binder.

Intake Walk-in from Non-Owner:

1. Intake Runner obtains a unique Intake ID # from the Intake Specialist, then assigns that number to the animal (or animal group). Fills out one Shelter Intake form per animal (or animal group) with the assigned Intake ID # and non-owner and animal information.
    - If owner information is known, put the owner information in the main fields and the non-owner in the Comments/Alternate Contact field, noting this is the non-owner dropping off.
2. Intake Specialist fills in one row on the Master Intake form with info provided by Intake Runner for each animal (or animal group). Manages the allocation of unique Intake ID #s to the Intake Runners (see "Intake ID" in Best Practices below).
3. Shelterly Intake Tech uses the Shelterly "Intake from Walk-In (Non-Owner)" workflow, and then adds the Shelterly A# to the Shelter Intake form and to the Master Intake form. Prints Animal Care Schedule.
4. Intake Specialist requests a shelter runner to transfer animal to a shelter enclosure, and adds building/room (if known) to the Shelter Intake form. Gives the shelter runner a copy of the Shelter Intake form and also the printed Animal Care Schedule.
    - Shelter team adds A# to shelter map (use Intake ID # if A# not yet available).
5. Shelterly Intake Tech updates animal with building/room in Shelterly (or this may be handled by the shelter team).
6. Intake Specialist files original Shelter Intake form in binder.
7. Intake Specialist follows up later with owner (if known) to get them to come in and sign liability release(s).

Intake from Field Team where animal was part of an assigned Shelterly SR:

1. Intake Runner puts A#, SR# and FA# on Shelter Intake form.
    - Each animal (or animal group with one A#) gets a separate Shelter Intake form.
    - While nothing else beyond A#, SR#, and FA# is needed, it's preferred to fill out the Shelter Intake form with:
        - Owner last name, animal species, and a general description (color, possibly age/sex/injury status as appropriate or useful)
        - Any additional relevant information gathered by the Field Team while visiting and transporting the animal(s):
            - Ex: Triage notes or medical observations (animal observed limping).
            - Ex: Info on how to distinguish similar animals delivered together.
2. Intake Specialist enters the A# and other info on the Master Intake form (leave Intake ID # blank).
3. Shelterly Intake Tech uses the Shelterly "Intake from Field Assignment" workflow to mark the animal as sheltered. Prints Animal Care Schedule.
    - Note that this task should be done ASAP so that debrief of Field teams is not delayed.
4. Intake Specialist requests a shelter runner to transfer animal to a shelter enclosure, and adds building/room (if known) to the Shelter Intake form. Gives the shelter runner a copy of the Shelter Intake form and also the printed Animal Care Schedule.
    - Shelter team adds A# to shelter map.
5. Shelterly Intake Tech updates animal with building/room in Shelterly (or this may be handled by the shelter team).
6. Intake Specialist files original Shelter Intake form in binder.
7. Intake Specialist follows up later with owner (if known) to get them to come in and sign Liability release(s).

Intake from Field Team where animal was not part of assigned SR, but very confident is same owner:

1. Intake Runner obtains a unique Intake ID # from the Intake Specialist, then assigns that number to the animal (or animal group). Fills out one Shelter Intake form per animal (or animal group) with the assigned Intake ID #, SR#, FA#, and animal info (copied from Field team's Found Animal form).
2. Intake Specialist fills in one row on the Master Intake form with info provided by Intake Runner for each animal (or animal group). Manages the allocation of unique Intake ID #s to the Intake Runners (see "Intake ID" in Best Practices below).
3. Shelterly Intake Tech uses the Shelterly "Intake from Field Assignment" workflow to add the animal to the SR in Shelterly (with the "+" icon). Marks the animal as sheltered. Adds the A# to the Shelter Intake form and the Master Intake form. Prints Animal Care Schedule.
    - Note that this task should be done ASAP so that debrief of Field teams is not delayed.
4. Intake Specialist requests a shelter runner to transfer animal to a shelter enclosure, and adds building/room (if known) to the Shelter Intake form. Gives the shelter runner a copy of the Shelter Intake form and also the printed Animal Care Schedule.
    - Shelter team adds A# to shelter map (use Intake ID # if A# not yet available).
5. Shelterly Intake Tech updates animal with building/room in Shelterly (or this may be handled by the shelter team).
6. Intake Specialist files original Shelter Intake form in binder.
7. Intake Specialist follows up later with owner (if known) to get them to come in and sign Liability release(s).

Intake from Field Team where animal was not part of assigned SR, and not confident is same owner:

1. Intake Runner obtains a unique Intake ID # from the Intake Specialist, then assigns that number to the animal (or animal group). Fills out one Shelter Intake form per animal (or animal group) with

the assigned Intake ID #, FA#, Field Team Member name, found location, owner info if known, and animal info by (copied from Field team's Found Animal form).

2. Intake Specialist fills in one row on the Master Intake form with info provided by Intake Runner for each animal (or animal group). Manages the allocation of unique Intake ID #s to the Intake Runners (see "Intake ID" in Best Practices below).
3. Shelterly Intake Tech uses the Shelterly "Intake from Walk-In (Field Team Member)" workflow to enter the animal into Shelterly. Adds the A# to the Shelter Intake form and the Master Intake form. Prints Animal Care Schedule.
    - Note that this task should be done ASAP so that debrief of Field teams is not delayed.
    - Alternative method for Shelterly Intake Tech:
        - *This method is slightly more complex, but has the advantage of tying the new animal to the entire field team and to their other assigned work for the day.*
        - Instead of using "Intake from Walk-In (Field Team Member)", create a new SR for the animal and add the SR to the field team's existing FA.
        - Then enter the A# and SR# to the Shelter Intake form and Master Intake form.
4. Intake Specialist requests a shelter runner to transfer animal to a shelter enclosure, and adds building/room (if known) to the Shelter Intake form. Gives the shelter runner a copy of the Shelter Intake form and also the printed Animal Care Schedule.
    - Shelter team adds A# to shelter map (use Intake ID # if A# not yet available).
5. Shelterly Intake Tech updates animal with building/room in Shelterly (or this may be handled by the shelter team).
6. Intake Specialist files original Shelter Intake form in binder.
7. Intake Specialist follows up later with owner (if known) to get them to come in and sign Liability release(s).

Paper-Only Intake (No Shelterly):

1. Intake Runner obtains a unique Intake ID # from the Intake Specialist, then assigns that number to the animal (or animal group). Fills out one Shelter Intake form per animal (or animal group) with the assigned Intake ID # and owner/non-owner/field team member info and animal information. If owner present, gets them to sign Liability release(s).
2. Intake Specialist fills in one row on the Master Intake form with info provided by Intake Runner for each animal (or animal group). Manages the allocation of unique Intake ID #s to the Intake Runners (see "Intake ID" in Best Practices below).
3. Intake Specialist requests a shelter runner to transfer animal to a shelter enclosure, and adds building/room (if known) to the Shelter Intake form. Gives the shelter runner a copy of the Shelter Intake form and also a blank Animal Care Schedule with the Intake ID # written on it.
    - Shelter team adds Intake ID # to shelter map.
4. Intake Runner returns to owner (if present) and gives them a copy of the Shelter Intake form and Liability release(s).
5. Intake Specialist files Shelter Intake form and Liability release(s) in binder.

Best Practices

Intake ID

Each animal (or group of animals) coming into intake should immediately be assigned a unique ID #, ideally before they are unloaded from the vehicle. If Intake Runners are using Shelterly to do intake before the animal is unloaded, then the Shelterly A# is the unique ID. But often in large incidents, intake at the vehicles is done on paper and the Shelterly data entry happens later. So, each animal will need a temporary, manually-generated Intake ID # assigned:

- Intake ID #s should have a unique prefix for each intake location.
    - Example prefixes: Imagine a large animal shelter with two intake stations, one for animals being dropped off by the public and one for animals from field teams. Use LA-001, LA-002, etc. for owner dropoffs, and FLA-001, FLA-002, etc. for dropoffs from field teams.
    - Another method is to incorporate the shelter name into the prefix, e.g. C-001, etc. for the Camelot Shelter.
- Recommended process for ensuring that each Intake ID # is used only once:
    - Intake Specialist has a preprinted list of Intake ID #s (e.g. LA-001, LA-002, … LA-100 for the large animal shelter intake station). As each number is assigned to an animal, they draw a line through that number on the list.
    - If multiple Intake Runners are operating at the same time, the Intake Specialist can prefill the unique Intake ID #s onto the individual Shelter Intake forms handed to each Intake Runner. All prefilled numbers should be crossed out on the preprinted list to prevent reuse.
- Once the Intake Runner has assigned an Intake ID # to an animal, that # should be written on the Master Intake form along with the rest of the animal's info.

An animal's Intake ID # is later associated with their Shelterly A# when the animal is entered into Shelterly (via the Shelterly "Intake ID" field).

- Once a Shelterly A# has been generated for an animal, the A# should be written onto the Master Intake form.
- Don't confuse the "Intake ID" and "External ID" fields in Shelterly – External ID is for the animal's ID in external software like Chameleon, Shelter Buddy, PetPoint, etc.

Adding Info to Shelter Intake Forms

We recommend using a standard color pen (black or blue) at initial intake, then a contrasting color pen (red or green) when adding information generated by entering the animal into Shelterly (e.g. A#).

Reconciling Shelterly with Master Intake Form and Shelter Map

It's highly recommended to do regular cross-checks between the information in Shelterly, the information on the Master Intake form, and the information on the paper/whiteboard shelter map. The best way to do this is to print a list of the animals from Shelterly, and then compare that list to the hand-written records:

- Search Animals > Advanced Search > filter by the shelter.
    - Can additionally filter by building/room in the shelter – can select more than one.
- Select Download All > Animal List in upper right to download a CSV file (spreadsheet) of your Animal Search results.
- Be sure to verify that Intake ID #, Shelterly A#, and building/room # (if the animal has a room # in Shelterly) are consistent between Shelterly, the Master Intake form, and the shelter map (often on a whiteboard).

Alternative method:

- Use the Download Animal List feature in Shelterly's Shelter module.

Transferring Animals from Vehicle to Shelter

All animals should be labeled with their A# (or Intake ID # if the Shelterly A# is not available).

- Small animals: Initially, place label on the carrier, then later attach a neck band or other label.
- Large animals: Use mane clip, livestock marker, sharpie on hoof, etc. If possible, attach # at time of intake, but with large animals it may be safer to wait until later to label them.

Intake runners can return carriers, halters, leads, etc. to owners after the animal is housed in the shelter.